Turning Insight into Action with Customer Feedback in Salesforce
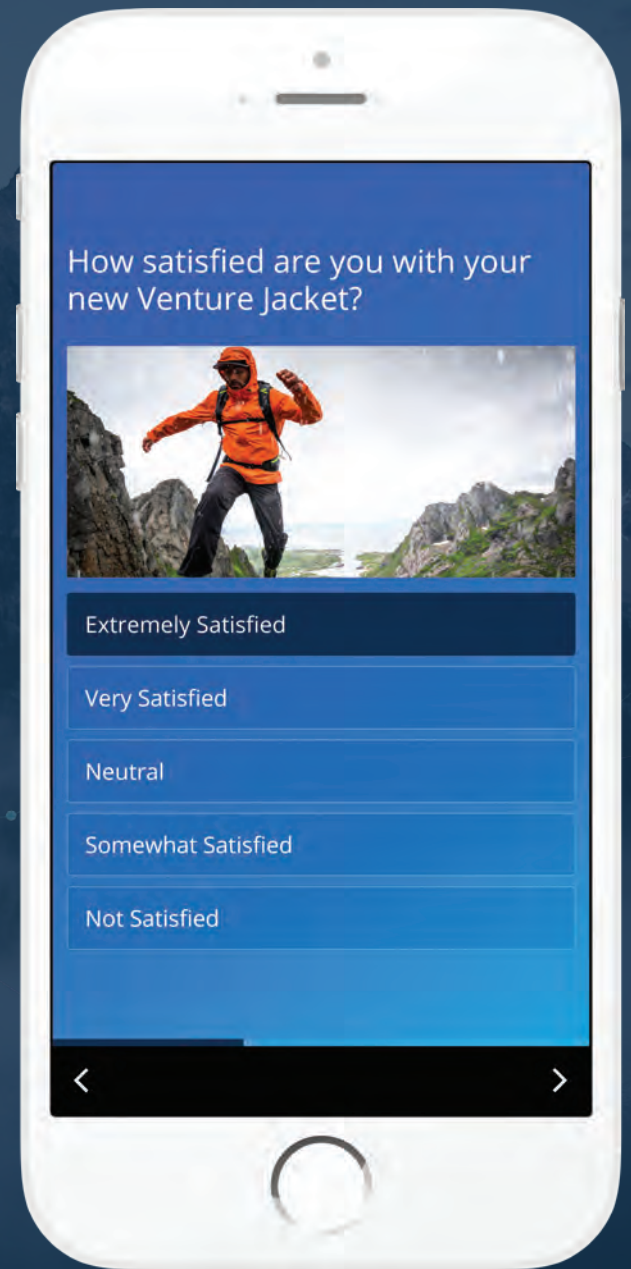
How satisfied are you with your new Venture Jacket?

Extremely Satisfied

Very Satisfied

Neutral

Somewhat Satisfied

Not Satisfied

getfeedback

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Introduction

What are you doing with your customer data?

In the age of customer experience, most companies recognize how customer satisfaction impacts brand success. They run customer satisfaction surveys to measure the success of their customer-facing teams. They ask for feedback on products and services to stay relevant and competitive in an evolving market.

Every company needs to ask these questions to succeed, but without the right context, customer data can't reach its full potential. If someone rates a support agent poorly, is that a reflection of the agent's performance or the customer's waning trust in the company? If a long-time customer churns, can customer success point to the exact reasons why?

Without context, a CSAT score can't inspire thoughtful action. As customer expectations rise and companies bank on retention to meet their bottom lines, listening to customers the right way is crucial.

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Why feedback should live in Salesforce

Think about why you survey customers in the first place. To monitor customer health? Identify business weaknesses? Generate ideas for new products or services? Likely, all of the above. That feedback is gold when leveraged correctly.

Salesforce integration helps you take profound action with the data you collect. Rather than sending a survey and mining the results for trends, survey responses automatically attach to Contacts, Accounts, Cases, and more.

As a result, you gain a 360-degree view of the customer. You know what they've purchased, what you're trying to sell them, how well you're supporting them, how often you're contacting them, and what they want to see next. This isn't a cryptic Excel spreadsheet, poured over then forgotten. It becomes trackable, actionable data in Salesforce.
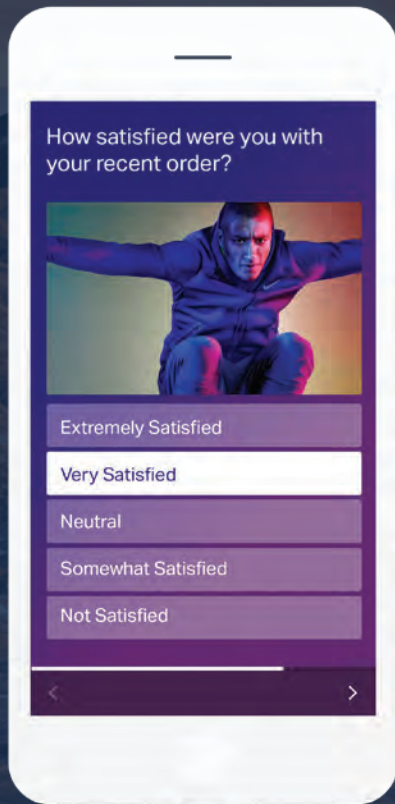
With this level of integration, business leaders can spot trends and make educated, data-driven decisions. Salesforce integration also offers visibility company-wide, so every leader—from support and success to marketing and sales—can more effectively manage their departments. When companies pair the customer voice with their customer data, they can make choices that drive positive change.

Who this guide is for

Business leaders who want to design a seamless customer experience can use this guide as a starting point. We'll discuss some of the critical interactions customers have with your company daily and how those shape their experience. Plus, we'll dive into the bigger questions customer surveys answer. With the right approach, your company can leverage that feedback to increase customer satisfaction and streamline processes company-wide.

Customer Support & CSAT Surveys

When you integrate survey data with Salesforce, you can effectively automate customer experience measurement.

Over half of consumers have switched providers in the past year because of bad customer service.[1] Even more than pricing, consumers seem to consider overall customer experience when deciding who they'll buy from. If you already run customer surveys, you likely send them after major customer touch points like support calls, purchases, and in-person visits.

Customer feedback can motivate support team members and reveal quality issues quickly. It doesn't end there though. When you integrate survey data with Salesforce, you can effectively automate customer experience measurement. Customer survey responses live alongside the key customer info in Salesforce, giving you a comprehensive look at customer health and happiness.

A **customer satisfaction survey** asks customers for feedback on a specific experience. When it's sent and feedback is collected, the results are mapped directly to customer records. From there, you can analyze survey data and spot trends. For example, if West Coast customers generally give support higher ratings, that could be an indicator of better service coverage.

This 360-degree view of the customer helps support teams identify the factors affecting customer happiness. That level of insight lays the path for action. If the same question keeps coming up around one topic, maybe the knowledge base article needs a rewrite. If support ratings are consistently poor around lunchtime, you might need to revisit the staffing schedule.

Of course, the factors impacting customer happiness are often outside support's control. When that's the case, support leaders need tangible data to share with other departments. Consistent customer satisfaction metrics help them zero in on the source of trouble. With data in hand, departments can take steps to improve customer experience.

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1   Accenture, "Digital disconnect in customer engagement"

PRO TIP: Boost survey response rates by customizing your survey timing. Salesforce workflows can trigger CSAT surveys based on specific conditions—like after 15 days have passed since the customer last shared feedback.

Using the Case Closed CSAT Survey

The most common use case for CSAT is the **case closed customer satisfaction survey**. To send it, you'll create a rule in Salesforce that triggers the survey when a customer support interaction is marked "closed." You can limit the frequency based a variety of factors (like how recently the customer shared feedback) or send the survey with every closed case.

The case closed CSAT survey is a powerful indicator of customer happiness. By sending it after key customer touch points, you get a good picture of resolution quality. The most effective support teams will have high CSAT scores for overall case-handling because they're focused on finding solutions efficiently. Lower CSAT scores suggest service, product, or overall business problems.

Alone, a CSAT score can tell you a lot about support quality and overall customer happiness. But to take action on the data, you need more context. When CSAT survey data is synced with Salesforce, support teams can analyze customer satisfaction alongside other meaningful factors, like location, account age, company size, and more. From there, piecing together the customer story is much simpler.

Taking Action with CSAT Data

Trigger email alerts for poor CSAT ratings

When a customer has a negative experience, you want to resolve it as quickly as possible. Salesforce workflows can trigger automatic email alerts to notify team members about negative CSAT ratings. This clues in team and account managers so they can help agents solve the problem.

Beyond improving communication, this sets the tone for team collaboration. Account managers who may be unaware of ongoing issues can reach out to customers to help repair the

SEND IT AFTER

- Email support cases
- Phone calls
- Live chats
- Training sessions
- In-person visits

THE RESULTS REVEAL

- Support quality by channel
- Customer expectations
- Potential reasons for churn
- Product satisfaction
- Feature and service requests

USE THE DATA TO

- Find gaps in support coverage
- Design effective customer resources
- Share retention data with customer success
- Send product feedback to other teams
- Make decisions about new services and offerings

damage. And best of all, all this can happen without taking up more of the support agent's time.

Create Follow-Up Tasks for Record Owners

It's tough to bridge the gap between customer support and other departments when their data lives in different places. To up the accountability, you can design workflows that create tasks for the record owner automatically, all based on the CSAT rating a customer leaves.

For example, a CSAT rating of 6 or lower could create a customer follow-up task for the account manager. This loops in the customer's main point of contact so they can follow up with the customer or reach out to the support agent.

Reopen Cases with Poor CSAT Ratings

When a customer rates an agent poorly, a Salesforce workflow can automatically trigger a case reopen. Maybe there was a miscommunication or the customer isn't happy with how their question was handled. The reopen trigger gives the agent an opportunity to follow up and rectify the situation.
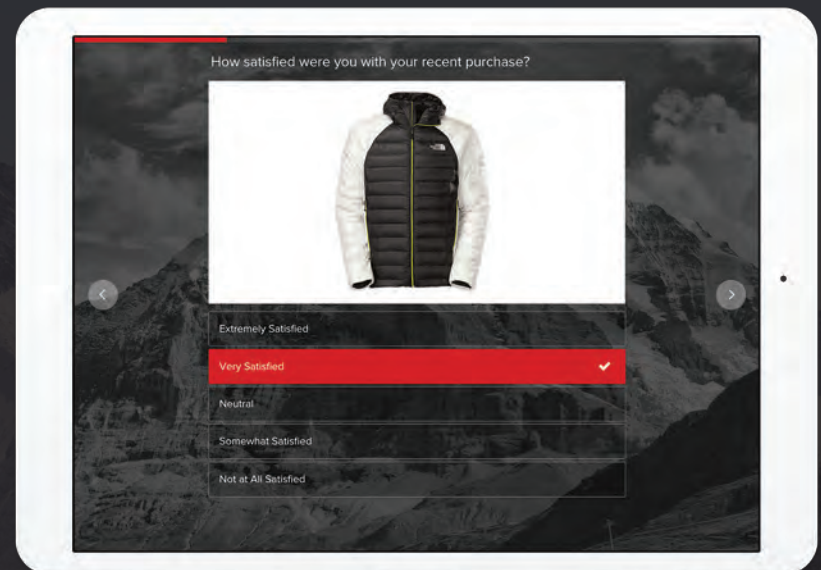
Customer Success & NPS Surveys

Organizations like Zappos and Amazon have long focused on customer satisfaction, and their success affirms their customer-centric philosophy. Customer satisfaction is a prerequisite for customer loyalty—it breeds success. And by 2020, experts predict that customer experience will overtake price and product as the key brand differentiator for B2B sales.[2]

We also know that satisfied customers are more likely to make repeat purchases. In fact, data suggests that companies with happy customers have as much as a 16% advantage over competitors in consumers' willingness to buy, reluctance to switch brands, and likelihood of recommending them.[3] For customer success teams, that means effective measurement systems are key to customer loyalty initiatives.

So how do you leverage satisfaction to boost retention? First, you can give your customers a more powerful voice. The **Net Promoter Score survey** is particularly valuable for customer success teams. With just one

question—*How likely are you to recommend us?*—you can begin measuring customer loyalty.

Customer success teams can use NPS survey results to take action before unhappy customers (or Detractors) churn. And on the flip side, it becomes much easier to identify potential brand advocates (or Promoters) by their positive NPS scores.

People trust peer recommendations over advertising. In fact, 8 out of 10 consumers trust recommendations from people they know, and over two thirds trust online reviews.[4] Companies should take full advantage of referral opportunities—and customer success holds the key. The relationships success managers build with their customers can drive referrals that drive business, and that all whittles down to satisfaction.

CSAT scores can guide renewal and upsell efforts too. Paired with other customer health metrics, customer satisfaction surveys measure specific touch points that impact the entire customer journey.

Salesforce-aware surveys will push results directly onto customer records, so customer success managers have constant customer insights housed within each account.

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2   Walker, "Customers 2020"
3   Temkin Group, "The ROI of Customer Experience"

4   Nielsen, "Global Trust in Advertising"

For customer success managers, that means less guesswork. Monitoring customer health is as simple as running a report or building a dashboard. And Salesforce-aware surveys will push results directly onto customer records, so customer success managers have constant customer insights housed within each account.

> PRO TIP: Use open-ended survey questions to give customers more freedom. Their responses will often reveal breakdowns in company processes, product and service popularity, and the qualities that differentiate you from the competition.

Using the Net Promoter Score Survey

The **Net Promoter Score (NPS) survey** reveals a lot about customer health. It asks customers how likely they are to recommend your company to others. The results help you measure overall customer health and identify potential brand advocates or at-risk accounts in the mix.

Unlike traditional CSAT surveys, NPS is typically sent manually at key stages in the customer journey. Comparing NPS at different stages can reveal a great deal about the customer lifecycle, from pre-sale all the way through onboarding, renewal, and beyond. This data can supplement other customer health metrics in Salesforce.

NPS survey responses place customers into clear factions: Detractors, Passives, and Promoters. Detractors are the at-risk customers who need the most care from customer success managers. Passives are middle-of-the-road customers who typically need a push to re-engage. And Promoters are your money shots—the people you can look to for help in advancing your brand (and the customers we'd all love to clone).

> PRO TIP: Embed an NPS survey into emails to increase the response rate. Customers can respond to the survey right from the email. Use a Thank You page to direct Promoters to review sites, where they can rate your company publicly.

SEND IT BEFORE AND/OR AFTER

- Sign-up
- Onboarding
- Renewal
- Cancelation
- Program/offer changes

THE RESULTS REVEAL

- Sales flow
- Onboarding quality
- Upsell opportunities
- Common reasons for churn
- Overall customer sentiment

USE THE DATA TO

- Improve sales-to-success handoff
- Optimize onboarding processes
- Define upsell criteria
- Address common pain points
- Report on customer health

Taking Action with NPS Data

Trigger Email Alerts for Poor NPS Ratings

If a customer wouldn't recommend your brand to others, that's cause for concern. Customer success managers should be in tune with the factors that encourage or discourage brand advocacy. Salesforce workflows can trigger automatic alert emails that notify the success manager and other relevant team members when poor NPS ratings come in. The CSM can step in quickly to perform damage control that saves the customer from churning.

Create Follow-Up Tasks for Record Owners

Whether the record owner is the CSM or the salesperson, automatic follow-up tasks can accelerate team processes. Say a customer gives your company a perfect NPS rating. The window of time to act— whether it's upselling them, asking for referrals, or just reaching out with a kind word—may be slim. Automated tasks set the follow-up process into motion so you can get the most out of each response.

Add NPS to Customer Health Dashboards

Since NPS is a telling customer health metric, it deserves a place in success dashboards. When NPS results are mapped directly to Salesforce, you can use that data in reports and workflows. It's valuable for cross-departmental communication as well. When other teams see positive or negative NPS rating in customer records, they'll be more equipped to serve that customers' unique needs.

Community Management & CSAT Surveys

Community management demands more thoughtful customer care than most roles. As the most publicly visible customer-facing team, community actions echo widely across the brand and business. Consider social media support—it puts customer interactions in plain sight, and over two thirds of consumers have used social media for customer service.[5]

Whether it's a knowledge base article, a social campaign, or a forum post, the content you design needs to send the right message. With timely feedback, you can make that happen. A **customer satisfaction survey** can appear on your front-end website, at the end of your knowledge base articles, and after key interactions.

If customer support is receiving tons of questions around a new feature, you may be held accountable for customer education (or the lack thereof). CSAT survey results help community teams identify and fill the gaps. This can polish communication between teams and lead to more data-driven decisions around content production.

Using the CSAT Survey

Customer satisfaction surveys ask customers for simple feedback on a specific experience. You can distribute CSAT surveys in a number of ways. Email surveys are the most common, but community managers may find web surveys especially useful. The survey pops up on a landing page, requesting feedback from the visitor. It's a great way to get feedback right then and there.

CSAT surveys can polish communication between teams and lead to more data-driven decisions around content production.

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5   J.D. Power and Associates, "2013 Social Media Benchmark Study"
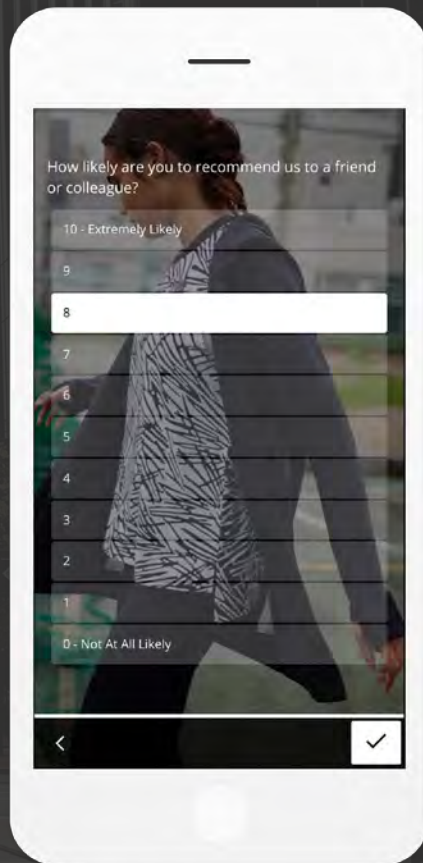
Open-ended questions are helpful too, particularly when customers leave extremely positive or negative ratings. If a knowledge base article gets a 1 for quality, you'll want to know why. Specifics can help teams quickly identify and fix small issues that are causing big headaches. Overall, CSAT surveys bridge the gap between company and customer, reducing friction throughout the customer journey.

SEND IT BEFORE AND/OR AFTER

- Knowledge base articles
- Social media support interactions
- Email support cases
- Webinars and events
- In-person interactions

THE RESULTS REVEAL

- Article quality
- Social support satisfaction
- Email support satisfaction
- Attendee information
- Product and service needs

THE RESULTS REVEAL

- Prioritize knowledge base updates
- Optimize social media support
- Improve email case-handling
- Learn about customer education preferences
- Share targeted feedback with other departments

Survey Data in Salesforce

Supplement Your Standard Customer Records

With integrated survey data, factors that seem intangible—like preferences and loyalty—come to life in Salesforce. This data spans many departments and roles, and it can influence the greater company strategy. Marketing can send branding surveys to get competitive insights. Sales can send closed-lost surveys to see where sales opportunities went sour.

Here are some other examples of what you'd see in standard customer records after integrating surveys with Salesforce:

- Pre-sale feedback
- Competitive loss feedback
- Customer support satisfaction rating
- Product feedback
- Customer purchase intent
- Pricing feedback
- Net Promoter Score

Visualize Your Customer Lifecycle

The customer lifecycle is typically broken down into five key stages: discovery, acquisition, development, retention, and advocacy. Ongoing customer feedback reveals obstacles at each of those stages, so companies can gradually design better customer experiences that drive growth and retention.

Here are some examples of questions suited to each stage of the customer lifecycle:

DISCOVERY

- What kind of solution are you looking for?
- How would you rate our pricing?
- How interested are you in this product?

ACQUISITION

- How would you rate your trial?
- Are you interested in more info?
- Can we help you find something?

Salesforce integration allows everyone to learn from customer churn. Teams can recognize the role their choices play in customer retention and customer loss.

DEVELOPMENT

- Why did you choose this product or plan?
- How would you rate the purchase process?
- What did we do well / What can we improve?

RETENTION

- What do you like best about our product or service?
- What can we do to improve?
- How would you rate our service so far?

ADVOCACY

- How likely are you to recommend us to a friend or colleague?
- How satisfied are you with our product / service?
- Are there any specific offers you'd like to see in the future?

The feedback you collect at each stage of the customer lifecycle breeds better understanding of current and future customers. With customer satisfaction metrics coloring the landscape, you can make decisions that drive customer loyalty.

Quickly Correct Poor Experiences

Customers expect quick responses to negative feedback, so it's important to sound the alarm right away when things go wrong. Salesforce workflows and alerts streamline case escalations, helping teams spring into action immediately.

Increase Visibility

Consider the times you've been blindsided by a customer reaction. If you had a process in place to forecast customer health, the story might have ended differently. When you have the full picture in front of you, it becomes second nature to put customers first.

Create a Culture of Customer Happiness

Customer satisfaction isn't just a customer-facing priority. It takes an entire company to get it right. Integrating customer feedback into Salesforce allows each team to recognize its role in customer experience. With greater transparency around customer health and happiness, organizations can take action.

GetFeedback and Service Cloud

Any company can create branded, mobile-ready customers surveys with GetFeedback, but Salesforce Service Cloud users gain unique benefits from the integration. You can set survey responses to automatically associate with existing customer data in Salesforce. And for deeper insights, it's simple to segment individual customer responses using Salesforce analytics or GetFeedback's all-new Analytics dashboards.

Customer feedback is the core of all customer-centric organizations. Every company wants to know its customer satisfaction score, but few have a solution that helps them do something more with that number. GetFeedback for Salesforce Service Cloud puts you in control of your customer insights, so you can use that data for good.

Visit **getfeedback.com/salesforce** to explore the integration.

"Zenefits uses GetFeedback to measure customer satisfaction levels at every step of a customer interaction. Survey results are automatically associated with the customer record in Service Cloud, enabling the right people at the company to monitor and react in real time."

Joshua Jackson
Business Operations, Customer Support
Zenefits

ABOUT GETFEEDBACK

GetFeedback is the #1-rated customer feedback solution for the Salesforce ecosystem. Understand and improve your customer experience with beautiful, mobile-friendly online surveys that you can build in minutes. Then translate customer insights into action by pushing individual survey responses to your CRM.

GetFeedback is used by some of the world's most innovative brands to measure satisfaction and maintain engagement — all while ensuring a seamless, branded customer experience.

★ getfeedback